Government Acquisition

Through

Electronic Commerce

(GATEC)

Lead Buyer User's Guide

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SECTION 1   Introduction

The purpose of this Guide is to provide the necessary information to permit a Lead Buyer to successfully use the advanced administrative features of the GATEC application. This document assumes that the PC-based software has been correctly installed on the Lead Buyer's PC, that the GATEC software has been correctly installed on the Site Hub and that the necessary network connectivity between the Lead Buyer's PC and the Site Hub has been established. [For details on the installation process, consult the *GATEC System Administrator's Guide*.]

This document is written under the assumption that the Lead Buyer has experience with all of the GATEC features available from the regular Buyer interface. [For information on the regular Buyer interface, consult the *GATEC Buyer User's Guide.*]

1.1   Identification

This Lead Buyer User's Guide supports release 2.4.1 of the GATEC application. The GATEC application was developed for the Aeronautical Systems Center, Operational and Central Support Contracting Division, Air Force Materiel Command at Wright-Patterson AFB by staff of the Technology Information Systems Program (TISP) at the Lawrence Livermore National Laboratory (LLNL), operated by the University of California for the Department of Energy.

1.2   Project Overview

Lawrence Livermore National Laboratory (LLNL), working in close conjunction with the Operational and Central Support Contracting Division at Wright-Patterson AFB, has developed an electronic contracting system for use by Government agencies. GATEC uses EDI technology (ANSI X12 transactions enveloped in *smtp* email) to send Request for Quotes (RFQs) to vendors, receive Quotes from vendors and to transmit Awards and Award Summary information back to vendors. The flow of information goes from existing standard procurement systems through a local on-site computer for translation, then over the Internet to the LLNL-VAN communication

hub computer for passing on to multiple Value Added Networks (VANs) and then on to vendors. The return routing is reversed. GATEC uses ANSI X12 standards and connects to VANs using either *smtp* or X400 enveloping standards. At the time of award, the pertinent award summary information is emailed to the VANs for public dissemination. GATEC has reduced procurement lead-time, increased competition (resulting in lower item costs), and improved buyer efficiency. Vendors gain access to more government requirements and have greater opportunities to compete for increased business. It is a part of the larger Electronic Commerce (EC) concept that envisions encompassing the entire business cycle from identification of a requirement through the procurement cycle and through the receiving/invoice/payment processes all electronically. The pilot has been operational since October 1992 and has documented the process improvements indicated. Refinements to the system are being made and it is ready to be exported to other sites. Further enhancements are planned in phases and include contract administration, small dollar service procurements, user access to an item description database and inclusion of large dollar solicitations, specifications and contracts.

The modular development of GATEC allows the vast majority of the system to work with other agency systems with minimal software development needed. It is the only DoD EDI system in operation that uses national commercial EDI standards encapsulated in standard Email, multiple value added networks, communicate all solicitation and award actions, and work with multiple standard procurement systems thereby allowing "one face to industry".

To date, GATEC use has resulted in a documented significant reduction in processing time and an increase in productivity. There are both direct and indirect savings resulting from the use of EDI. These process improvements and savings accrue for all parties involved. It is important to note that this is only one area of the business cycle where EDI and Electronic Commerce (EC) can provide benefits. GATEC is helping to make the vendor base EDI-capable. The use of commercially accepted standards and off the shelf equipment with VAN provided software allows them to use the same methods to communicate with their other trading partners.

The overall goal of the GATEC project was to implement the functional capabilities needed to move government commodity procurement functions to electronic commerce. The specific first year goal was to implement electronic commerce in 1993 by processing the majority of the ASC Wright-Patterson commodity procurements under $25,000 and to develop ASC Wright-Patterson into the DoD pilot site for electronic procurement using the Base Contracting Automated System (BCAS) procurement system.

1.3 Document Overview

This User's Guide was written for Release 2.4.1 of the LLNL GATEC application. It explains how a Lead Buyer performs administrative functions (such as adding/deleting Buyers, adding new PIIN numbers, moving work from one Buyer to another) and can perform statistical analysis of past GATEC transactions.

The Lead Buyer interface to the GATEC application runs on PC compatible DOS machines running Microsoft Windows Release 3.1.

1.3.1 Document Organization

Throughout this guide representative examples have been included to guide the Lead Buyer through the GATEC Lead Buyer features. The GATEC Lead Buyer User's Guide is made up of the following sections:

- The Table of Contents provides an outline of this guide.

- The Introduction describes the GATEC project, this guide and the document conventions used.

- The Establishing Communications section describes how to begin the worksession with your PC connected to the Site Hub.

- The System Parameters Management section describes how to use the System Parameter Management screens to perform the desired actions.

- The Lead Buyer section describes how to use the Lead Buyer screens to perform the desired actions.

- The Appendices include a trouble reporting form.

1.3.2   Document Conventions

The following conventions are used throughout this guide:

Boldface   Used to highlight commands and prompts. It indicates the exact command or text to be entered.

Italics   Used to highlight important messages and parts of a command line that must be replaces with something. For example, *msgs* would be replaced with a message number.

Courier   Used to provide examples of screen displays on your terminal. These examples are usually enclosed in a box.

ENTER   Press the **ENTER** key. This key may be labeled Enter, Carriage Return, Return, or shown as a down and left arrow on your keyboard.

CTRL-d   Press the **CTRL** key, hold it down and then press the d key. This key may be labeled CNTL or Control. Other characters may also be used in place of d.

ESC   Press the **ESCAPE** key. This key may be labeled Esc, ESC, ESCAPE or Escape.

BKSP   Press the **BACKSPACE** key.

SHIFT-d   Press the **SHIFT** key, hold it down and then press the d key. Other characters may also be used in place of d.

1.4   Submitting Error Reports

If you suspect that you have encountered an error, first contact your Systems Administrator for possible assistance. Many times, what appears to be an error is merely a misunderstanding in how the software operates. If your Systems Administrator confirms that it appears that an error has occurred, then try to categorize that error by experimenting with the software.

Errors can be separated into four sources; User error, GATEC software error, PC hardware or Local Area Network (LAN) failure, or Site Hub hardware failure.

User errors occur when an incorrect data value is entered into a filed on a form. Typically, user errors should not cause the software to crash - if it does, then an Error Report Form (Appendix A) should be filled out and submitted.

Although extensive testing should have located (and fixed) all of the possible GATEC software errors, it is possible that some software errors have slipped through and still exist. One way to tell whether or not an observed error is a software error is to repeat the exact same operation. Generally, software behaves exactly the same time after time, and thus the same error will occur if the same steps were followed. GATEC software errors should also be reported using the Error Report Form.

A PC or network failure error can usually be determined by a complete crash. Sometimes, the GATEC application will simply disappear from the screen and the windows will close. Sometimes, the application will "hang" (a command is given but nothing happens) and the hourglass will just stay there endlessly. For this type of failure, contact your local system administrator.

A Site Hub failure will usually affect more than a single user. For this type of failure, contact your local system administrator.

SECTION 2   Establishing Communications

This section of the Lead Buyer User's Guide provides information necessary to establish communications from the PC to the Site Hub.

2.1   Starting the Application

From the top level Windows screen, a typical depiction of the GATEC environment is as follows in Figure 2.1.1. The two options that only appear on the Lead Buyer's PC are the icons labeled Lead Buyer and System Parameters. These two applications are only installed on the Lead Buyer's PC. Any PC with these applications installed can execute the functions of the Lead Buyer.
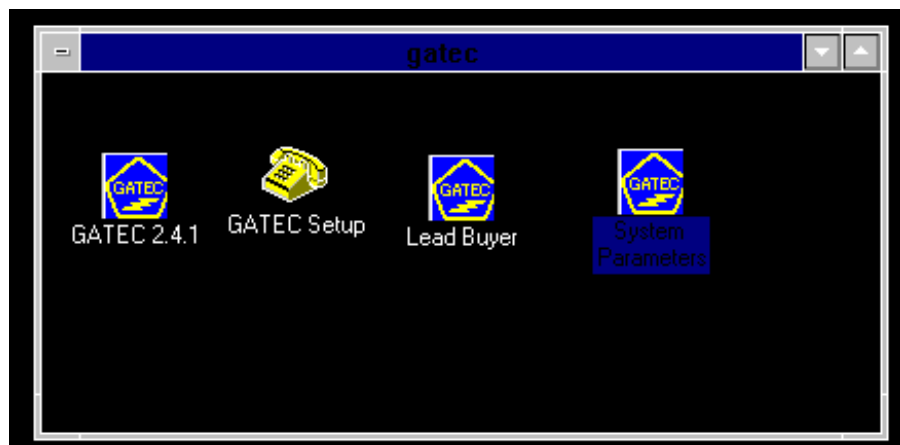
Figure 2.1.1 - Typical Windows Screen

In Figure 2.1.1, the applications labeled System Parameters is highlighted, indicating that it has been selected for execution. To execute this application, double-click the icon by positioning the mouse cursor over the icon and pressing the left-most button on the mouse twice rapidly. After a short while (less than 20 seconds), a connection to the GATEC Site Hub will be made and the user will be presented with the box shown in Figure 2.1.2.

Figure 2.1.2 - User Id Prompt

If this box does not appear within 30 seconds, or if the error box shown in Figure 2.1.3 appears, contact your Systems Administrator. This error message means that the process of establishing a communications path from the PC to the Site Hub has not been successful. This can be due to several problems, such as the local network is down, the Site Hub is down, or the communications protocols on the PC have not been correctly established. *[See the GATEC Buyer User's Guide for details on setting up communications protocols]*
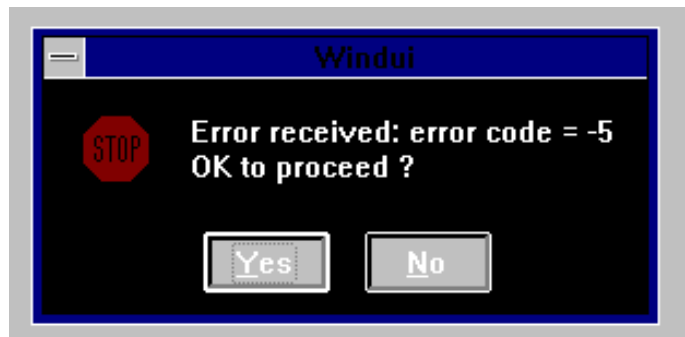
Figure 2.1.3 - Connection Error Message

When the application has established a communications path to the Site Hub, the Lead Buyer will be prompted for a valid User Id as shown in Figure 2.1.4. User Id's are assigned by the Systems Administrator. *[This procedure is described in the GATEC System Administrator's Guide.]*

Figure 2.1.4 - User Id Prompt, No Echo

The application will not echo the User Id entered into it, but uses the asterisk symbol. If, during data entry, you suspect you have made a typing error, just press the **BKSP** key until the User Id field is clear and then retype the entire string. The user has 30 seconds to enter a valid User Id. After typing the User Id, the user can either press the **ENTER** key or click the mouse on the **OK** button just below the User Id field. As soon as that happens, the box in Figure 2.1.5 will appear.

Figure 2.1.5 - User Password Prompt

When this box appears, you should enter the Password that corresponds to the User Id on the previous screen. The Systems Administrator issues both User Id's as well as Passwords. As before, as shown in Figure 2.1.6, the text of the password is echoed

Figure 2.1.6 - User Password Prompt, No Echo

as asterisks, so that a user's password is not compromised. If an invalid User Id or an invalid Password is entered, the error box shown in Figure 2.1.7 is displayed. If this happens, click the **OK** box and try re-entering the User Id and the Password carefully again. If the same error box is displayed, contact your Systems Administrator for assistance.

Figure 2.1.7 - Remote Session Error

If the Site Hub accepts the User Id and Password as valid, the box shown in Figure 2.1.8 will be displayed. As it says, this box indicates that a successful connection has been made.
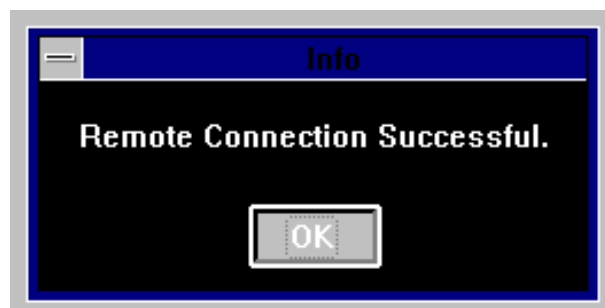
Figure 2.1.8 - Remote Session Successful

When this box is displayed, press either the ENTER key or click the mouse on the OK button. This action will bring up the System Parameter Management form, shown in Figure 2.2.1.

SECTION 3 Using the System Parameter Management Application

This section of the Lead Buyer User's Guide provides information necessary to use the System Parameter Application.

The System Parameter Management application allows a Lead Buyer to perform the following functions:

- Set the maximum priority for Requisitions that are selected for loading into the GATEC database.

- Set the maximum Government estimated value for Requisitions that are selected for loading into the GATEC database.

- Add, delete and/or modify Buyers to the GATEC database of buyers. Each GATEC buyers must already be established as a BCAS buyer.

- Set a flag to selectively download or not download to each Buyer.

- Establish a group of Purchase Order numbers (PIINs) which can be issued by GATEC and monitor the use of these numbers.

- Set the dates that are considered Holidays (non-working days).

- Establish whether or not acknowledgments for RFQs (840s), Purchase Orders (850s) or Email (864s) should be monitored.

- Establish the default times for posting RFQs and Required Delivery Dates as a function of Requisition Priority.

3.1 Starting the Application

As described in the section on Establishing Communications, from the top level Windows screen, a typical depiction of the GATEC environment is as appears in Figure 3.1.1. To start the System Parameters application, double-click the System Parameters icon with the mouse, resulting in the screen shown in Figure 3.2.1.
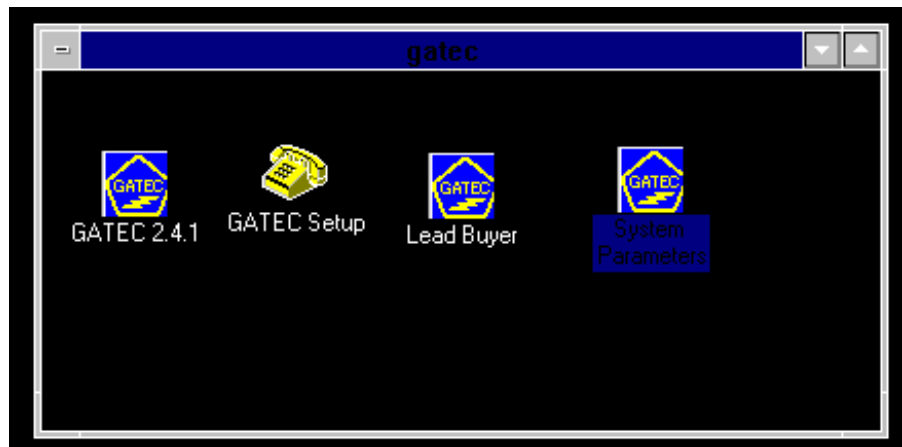
Figure 3.1.1 - Starting the Application

3.2   The System Management Parameter Screen

The System Parameter Management form is shown in Figure 3.2.1.

Figure 3.2.1 - System Parameter Management Form

Use of this form requires some knowledge of how the GATEC system operates. In brief, the GATEC software periodically downloads requisitions from the BCAS system and then determines

which of those requisitions should be entered into the GATEC database for electronic review and issuance. This process of determining which requisitions should be entered into GATEC is known as *filtering*. The top 3 boxes on the System Parameter Management form are settings used in this filtering process. If values in these boxes are changed and the results saved, then the next time that the requisition download occurs, the new values will be used. Existing requisitions already loaded into GATEC will not be affected. The three filters that can be modified are Maximum Priority, Maximum Price, and Buyer Id (known as BSP for Branch-Service-Person).

<u>Maximum Priority and Maximum Price Box</u>

The Maximum Priority and Maximum Price boxes are shown in Figure 3.2.2. Priorities are assigned to each Requisition, ranging from 1 to 15, with 1 being a High Priority (fast turnaround required) and 15 being a Low Priority (standard handling). It is not desired to have GATEC process High Priority Requisitions, as these requisitions must be manually expedited. Therefore, if the priority assigned to a Requisition is <u>less than</u> the value of the number in this field then the Requisition will not be loaded into GATEC. For instance, setting the value of this field to 0 (zero) will ensure that no Requisitions will be excluded on the basis of priority. Setting the value of this field to 99 will ensure that all Requisitions will be filtered out and that none will be entered into the GATEC database. Acceptable values for this field are any non-negative, 1 or 2 digit number. Unacceptable values will be replaced by the value 0 (zero) which will appear on the screen the next time this form is brought up. Therefore, entering a value for the Maximum Priority as AA will result in a value of 0 being used for the Maximum Priority.

Figure 3.2.2 - Maximum Priority & Price Boxes

The Maximum Price box serves two functions; one as a download filter and one as the maximum allowable award amount. Each Line Item on each Requisition has an estimated price associated with it. This estimated price is downloaded along with the Requisition and is used as another filtering factor. If the estimated price is greater than the value in the listed Maximum Price box, then that Requisition will not be entered into the GATEC database.

Also, at award time, the GATEC software will not allow a Purchase Order to exceed the value listed in the Maximum Price box. An error box will be displayed.

Any legal non-negative numeric value is acceptable into this field, but caution should be used in increasing this value. Current Federal Acquisition Regulations do not allow the electronic issuance of a

Purchase Order which exceeds $25k. While increasing this value would not automatically cause this to happen, it would cause the error box to not be displayed and would allow the Buyer to inadvertently issue such an award.

<u>Buyer Id Box</u>

The last modifiable filter is the Buyer Id, as shown in Figure 3.2.3. As each Requisition is entered into the BCAS system, it is automatically assigned to a Buyer by Federal Stock Classification (FSC). The BCAS system maintains a table with these assignments and the BCAS Systems Administrator can modify this table.

The GATEC system maintains a table of Buyers that are authorized for electronic procurement. This generally means that those Buyers have a Procurement Warrant. Only Buyers whose User Id (BSP code) appears in the GATEC table with the Download Box flag set to 'Y' (for YES) will have Requisitions downloaded from BCAS to GATEC for electronic processing. The BSP used here should be the same one that is assigned to them from the BCAS application.

Buyers			
BSP	First Name	Last Name	Download
G1A	Anderson	Fred	Y
G1T	Thompson	Sylvia	Y
G1G	Gerrold	Francis	Y
G1D	Demitri	Sam	Y
G1H	Harrison	Jerry	Y

Figure 3.2.3 - Buyer Id Box

To modify existing information, position the cursor anywhere in the row that you wish to modify. Click the mouse button once, which will highlight that row and place the cursor at the beginning of that row. The **TAB** key is used to move from one column to the next. The **BKSP** key is used to delete characters within a field and the left-Arrow and right-arrow keys are used to move the cursor around within a field.

For example, using Figure 3.2.3 as an example, to change Fred Anderson's BSP from G1A to G1C, first click the mouse anywhere in that first row, highlighting that row and positioning the cursor just to the left of the G in the first field. Then press the right-arrow key 3 times to position the cursor just to the right of the A. Then press **BKSP** once. Then type C.

Using this same example, suppose you want to not have Sam Demitri's requisitions downloaded. Click the mouse on the fourth row (highlighting Buyer G1D), and press TAB 3 times (moving the

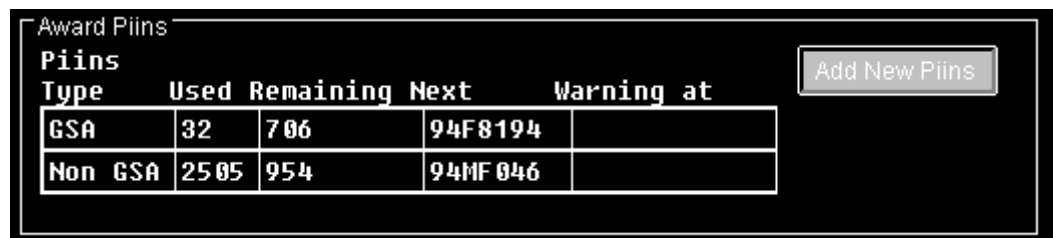cursor to the fourth column). Then press the right-arrow once, followed by **BKSP** and then the letter N.

To delete a Buyer, it is only necessary to just delete the BSP entry for that Buyer. So just click the mouse on the Buyer you want to delete, press right-arrow three times followed by **BKSP** three times (leaving the BSP field empty). When the file is saved, this Buyer will be removed. Visually, the Buyer will be removed from this table after you **QUIT** the application and bring it up again.

To add a Buyer, position the cursor on the line below where you want the new entry in this table and click the mouse. Then press the **INSERT** key on the keyboard. A blank row will be opened and you can then enter the relevant data into this row.

Award PIINs Box

The Award PIINs box is shown in Figure 3.2.4. An Award PIIN (Procurement Instrument Identification Number) is the basis for the Purchase Order Number issued by the BCAS system.

Award PIINs are separated into two different award types, GSA awards and non-GSA awards. During the Award process, GATEC will select the next available PIIN value for each respective award type. The USED column lists the number of available PIIN numbers left in each award type since the last time that a range of award PIINs were allocated. The REMAINING column lists the number of PIIN values left until GATEC runs out of PIIN values to assign. In Figure 3.2.4, for GSA awards, 32 awards have been issued with 706 available award numbers remaining. For non-GSA awards, The value of NEXT is the next award PIIN scheduled to be used. [Reminder: The values in this box are a snapshot of the value of the next PIIN at the instant the System Parameter Management application started and are not updated in real time. Therefore, since GATEC is continuously supplying PIINs to the Award process, it is likely that the value of the NEXT PIIN will change even during the time it takes to read this screen.]

Figure 3.2.4 - Award PIINs Box

The WARNING AT column lists the value of the PIIN that when attained results in an email warning message sent to the recipient listed in the MAIL WARNINGS TO box. To not send any warnings, this box should be left blank.

_____

PIIN values can be added in groups of up to 1000 at one time. To add new PIIN values, simply click the mouse on the **Add New PIINs** Button. The form shown in Figure 3.2.5 will then appear.
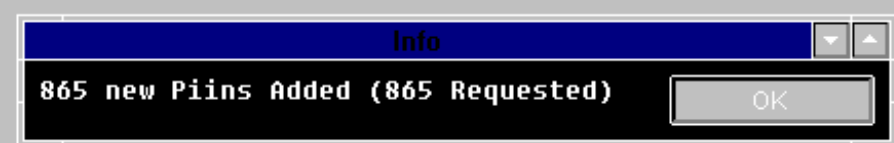

Figure 3.2.5 - Add New PIINs Box

The PIIN Prefix must be exactly 4 characters. If anything other than a four-character prefix is enter, the error box shown in Figure 3.2.6 will appear.

Figure 3.2.6 - PIIN Prefix Error Box

The AF convention is to set the first two characters of the PIIN prefix as the current fiscal year (i.e.., 94) and the next two characters as two letters (i.e.., MA). Both the Starting Number and the Ending Number must be no more than 3 characters in length. After starting and ending values have been entered, click the **Add PIINs** button. The process of adding PIINs to the award database may take 30 to 45 seconds, so be patient. When the PIINs have been successfully added, the box shown in Figure 3.2.7 is displayed.

Figure 3.2.7 - PIIN Add Successful Box

Holidays Box

Every time it issues a RFQ, the GATEC software calculates the date at which that RFQ becomes awardable (i.e.., a Closed RFQ). That date calculation is based on computing the number of working days from the date of RFQ issuance. In order to correctly compute the number of working days, the GATEC software must know about holidays. The box shown in Figure 3.2.8 is the Holidays box and allows the Lead Buyer to add, delete and modify the holiday schedule which affects all GATEC buyers on that installation of GATEC. Normally, this schedule would only be modified annually, but it could be used if an unplanned shutdown was anticipated on short notice for a known period of time.
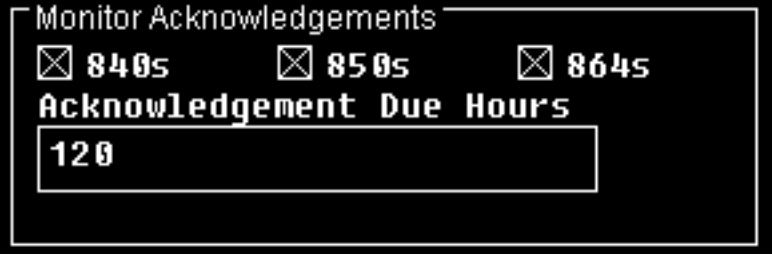

Figure 3.2.8 - Holidays Box

To modify an existing entry for year, click the box titled YEAR with the mouse. That places the cursor in the YEAR box. The value for YEAR may then be modified by pressing the right-arrow key, followed by the BKSP key, followed by typing in the value for the year. For instance, to change 1994 to 1995, click on the YEAR box, press right-arrow 4 times, press BKSP once, and then type 5.

To modify an existing entry for a Holiday date, click the entry to be changed within the box titled DATE with the mouse. That places the cursor at the first character in the DATE box and highlights that box. Then press the right arrow-key to move the cursor to the desired position and using the **BKSP** key, delete the old date and enter the new date. The TAB key moves the cursor to the beginning of the Holiday field, where using appropriate combinations of cursor keys and **BKSP** keys, the correct name for the holiday can be entered. Note that the textual description of the holiday is for informational purposes only, and has no real significance to GATEC. There is also no implied ordering of the dates.

To add an entry to a Holiday date, click the entry with the mouse within the box titled DATE below the desired location of the new entry. Then press the **INSERT** key. This creates a new entry and positions the cursor in the leftmost character of the DATE field. The format for the date is DDMMMYY, with each of the three entries separated by a space. For example, 26 DEC 94 is a legal entry. Use the TAB key to move the cursor to the Holiday text field.

Monitor Acknowledgments Box

The Monitor Acknowledgments box shown in Figure 3.2.9 permits the Lead Buyer to turn on or turn off whether or not functional acknowledgments should be monitored and how long a period of time should be allowed to elapse before an warning email message is generated. To change a flag in a box, just click the mouse on that box. The X will either appear or disappear, depending on whether it was there before. To change the `Acknowledgment Due Hours` box, click the mouse on the value, highlighting it. Then type the desired value.

Figure 3.2.9 - Monitor Acknowledgments Box

Using the example shown in Figure 3.2.9, this Lead Buyer has requested that acknowledgments be monitored for Requests for Quote (840), Purchase Orders (850) and Text Email (864), and that a notification message be sent to the local GATECMGR mailbox if 120 hours elapses after any of these transactions have been issued and an acknowledgment has not been received. (For the 840, which is a one-to-many transaction, receipt of at least one acknowledgment is sufficient to satisfy the monitor.)

RFQ Response Times Box

The RFQ Response Times box shown in Figure 3.2.10 allows the Lead Buyer to set the default times as a function of Requisition Priority for the Required Response Date (aka, Days on Street) as well as the Required Delivery Date (aka, Days to Deliver). The Requisition Priorities are fixed (non-user modifiable) to the three groupings shown in Figure 3.2.10. To change the Days on Street, click the mouse on the row you want to change and press the **TAB** key to move the cursor to the Days on Street column. Then press the right-arrow key, followed by **BKSP** to delete the existing value. Then type the desired value. To change the Days to Deliver, press the **TAB** key again, followed by the right-arrow key and **BKSP** key, followed by the desired value.

```
RFQ Response Times
Priority Days on Street Days to Deliver
1 - 3      5              30
4 - 8      5              30
9 -        5              30
```

Figure 3.2.10 - RFQ Response Times Box

Note that a Buyer can override either of these dates on an RFQ by RFQ basis - this box merely establishes the default values that GATEC fills in before presenting each RFQ to the Buyer.

Mail Warnings To Box

The Mail Warnings To box shown in Figure 3.2.11 allows the Lead Buyer to establish the email address to which the Monitor Acknowledgments warnings will be mailed. Multiple addresses may be entered by separating the entries with a comma. To edit this field, just select the text that you wish to modify with the mouse, and type in the new values. The GATEC Systems Administrator should ensure that a proper user account is established for whatever email address is specified in this box.

```
Mail Warnings to
gatecmgr@gatecb.wpafb.af.mil
```

Figure 3.2.11 - Mail Warnings To: Box

In the example shown in Figure 3.2.11, warning messages are sent to GATECMGR at the listed email location. Since this is an Internet address, messages can also be sent across the net to a remote location.

After the Lead Buyer has made whatever changes are desired, it is necessary to save those changes before the GATEC application actually uses them. The choice of buttons is shown in Figure 3.2.12. To save changes, click the Save Changes button with the mouse. Depending on what changes have been made, the saving process may require 20 to 30 seconds. If changes have been made to a screen that are not desired to be saved, click the Undo Changes button with the mouse. This will restore the values of the fields to what they were at the time the Lead Buyer invoked the System Parameter Management screen. If the Lead Buyer quits without saving changes, a warning box will be displayed which will confirm that is the desired action.
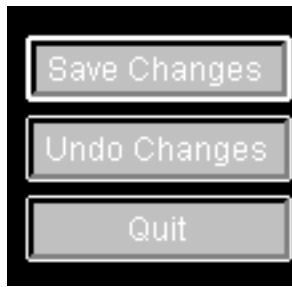
Figure 3.2.12 - Action Buttons

SECTION 4   Using the Lead Buyer Application

This section of the Lead Buyer User's Guide provides information necessary to use the Lead Buyer Application.

The Lead Buyer Application allows a Lead Buyer to perform the following functions:

• Perform a selection from the GATEC database based on BSP, Stock Class and Number, SRAN code, Start and End Date and RFQ Status. These selections allow multiple selects, and select ranges.

• Reassign work from one buyer to another

4.1   Starting the Application

As described in the section on Establishing Communications, from the top level Windows screen, a typical depiction of the GATEC environment is as appears in Figure 4.1.1. To start the Lead Buyer application, double-click the Lead Buyer icon with the mouse, respond to the questions regarding User ID and Password (see Section 2 for assistance) resulting in the screen shown in Figure 4.2.1.
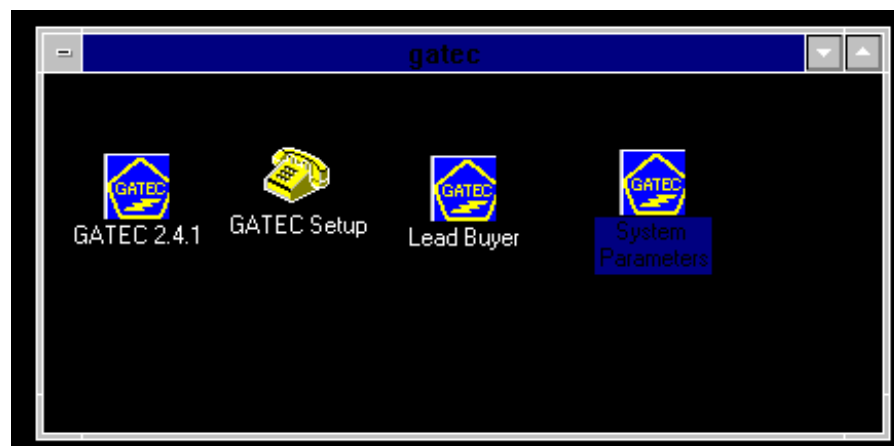
Figure 4.1.1 - Typical Windows Screen

The Lead Buyer form is shown in Figure 4.2.1.

Figure 4.2.1 - Lead Buyer Form

The overall syntax of this form is to establish what information you want and how you wish to display it by selecting the boxes at the top of the screen, and then determine what the selection criteria will be by entering values in those fields corresponding to the date elements that you wish to apply limits to.

This form is divided into two major boxes. The top box (the **What fields do you wish to select?** box) allows the user to select which aspects of an RFQ are to be displayed and the order that those data elements are to be displayed. The user can select among RFQ number, Stock Number, SRAN (Stock Record Account Number), Date, BSP (Branch-Section-Person) code and Review Status. Don't select boxes that you don't wish to have displayed.

Blank fields or unselected fields will allow all values allowable for that field to be searched. Therefore, only check those fields that you wish to <u>limit</u> the search on. [Checking all of the fields has the same effect as checking none of the fields.]

The Review status box is shown in Table 4.2.2.

Status	Abbreviation
Unissued, not Reviewed	UI
Unissued, Held	UH
Open	OP
Closed, under Review	CL
Closed, Held	CH
Closed, Held & Overdue	OD
Awarded	AD
Redirected	RE

Table 4.2.2 - Review Status Box

<u>RFQs</u>

When you enter the RFQ number, use the RFQ number without the Line Item extension. GATEC will locate all Line Items associated with that RFQ number. For instance, if you want to find out about RFQ 93TN907 Line Item 0001, enter 93TN907.

Acceptable values for the RFQ field are:

Single value: 93TN907
Multiple values: 93TN907, 93TN689, 93TP634 (comma delimited)
                93TN907 93TN689 93TP634 (blank delimited)
Range of Values: 93TN100-93TN200 (dash Delimited)

To find all RFQs with a TN in them, enter 93TN000-93TN999. To search across all RFQs with a TN or a TP in them, enter the range 93TN000-93TP999.

Stock Classes are the standard 4 digit Federal Stock Classification (FSC) number.

Examples of how to use this form will make it easier to understand it.

<u>Example 1:</u> Suppose the Lead Buyer wants to find out which Buyer was assigned RFQ# 93TN907. The Lead Buyer doesn't care what the RFQ status is, what the SRAN is, what the date of action was or what the Stock Number of that RFQ was. The setup to do this is shown in Figure 4.2.3.

The top boxes marked RFQ number and BSP are selected so that the listing of the search will only contain this information.

In the selection criteria area, since only a single RFQ is being looked for, the selection criteria box for RFQ just lists that RFQ number. The Buyer box does not have anything selected, indicating that the search is to span all buyers. Similarly, the Start and End Dates are empty, not placing any date limits on the search. The Review Status is not checked, allowing GATEC to search across all RFQ status categories to find 93TN907.

Figure 4.2.3 - Example 1: Lead Buyer Query on RFQs

The resulting screen after selecting the SELECT RFQs is shown in Figure 4.2.4. The search located three Line Items associated with RFQ number 93TN-907. All three line items were assigned to Buyer G1R.

Figure 4.2.4 - Response to Example 1: Lead Buyer Query on RFQs

Example 2: Suppose, given the previous scenario, that you wish to reassign one of the three Line Items to a different Buyer, say G1T. To do so, select the Item by clicking the mouse on the item you wish to reassign, as shown in Figure 4.2.5.

Figure 4.2.5 - Example 2: Reassign Line Items to Different Buyer

Then, click the CHANGE SELECTED RFQs button, resulting in the screen shown in Figure 4.2.6.

Figure 4.2.6 - Example 2: Change Selected RFQs Result

Then, as shown in Figure 4.2.7, select the Buyer to whom you wish to have the RFQ transferred to and click the SAVE CHANGES button.

Figure 4.2.7 - Example 2: Change Selected Buyer Result

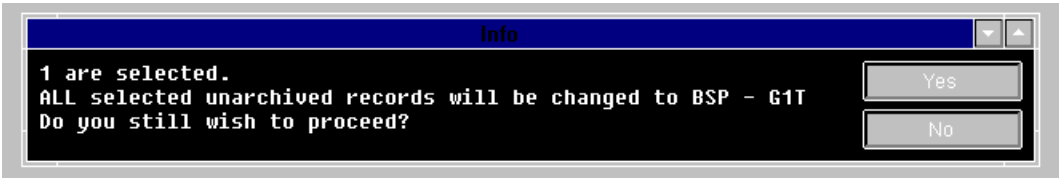After you select the SAVE CHANGES button, the following message box appears, as shown in Figure 4.2.8.

Figure 4.2.8 - Example 2: Save Changes Result

This box tells you the number of records that have been selected for change. If this seems right, click the mouse on the YES button to make the change. This process may take a minute or so, depending on the number of changes to be made and the other activity on the system. To see that the changes in this example were made, as shown in Figure 4.2.9, we can see that the selected RFQ Line Item was moved from BSP G1R to BSP G1T.

Figure 4.2.9 - Example 2: Final Result

SECTION 5   Appendices

This section contains the appendices of this Guide.

5.1   Appendix A - **GATEC Problem Report**

GATEC Problem Report Instructions

GATEC functional personnel should fill out the top box on this form. When received by LLNL staff, a unique number will be assigned to the problem report for tracking purposes.

Originator: This box should contain the name of the person most qualified to record the problem description. This person may be contacted by LLNL staff to clarify the actual nature of the problem.

Severity? Is the problem critical to getting productive accomplished? Does a work-around exist?

Reported to: Problems can be reported by phone to LLNL personnel. If this is the case, this space contains the name of the LLNL individual that was contacted about the problem.

Date: The date when the problem occurred or was first noticed.

Problem Description: Include as much of the details as possible to allow LLNL personnel to figure out what happened.

LLNL personnel will fill out the bottom box on this report.

Investigation Assigned to: This will be the name of the LLNL individual to whom the task of analyzing the problem is assigned.

Date Logged: This is the date when the problem report was logged into the system.

Problem Analysis: This is the analysis of the problem, which includes what piece of software or hardware did not operate as designed as well as the why of what happened.

Resolution: This is the suggested fix to the problem.

Approved for Implementation: This contains the Project Lead's approval which authorizes the implementation of the fix to begin.

Assigned to: This is the name of the programmer to whom the work was assigned.

Testing Completed: This contains the signature of the individual who certifies that the fix was tested.

Approved for Release: This contains the Project Lead's approval which authorizes the release of the fix to the customer.

New Version Number: This contains the version identifier for the new release that contains the fix.

Released to Customer: This is the date at which the new software was released to the customer.

Originator: _____   Problem Severity?   Severe?   _____
                                        (Check one...)   Moderate?   _____
                                                               Minor?   _____

Reported to: _____   Date: _____

Problem Description: _____

_____

_____

_____

_____

_____

_____

_____

Investigation Assigned to: _____   Date Logged: _____

Problem Analysis: _____

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_____

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_____

_____

_____

_____

_____

Resolution: _____

_____

Approved for Implementation: _____   Assigned to: _____

Testing Completed: _____   Approved for Release: _____

New Version Number: _____   Released to Customer: _____